Query Your Way to Better Ministry

ParishSOFT Intelligent Query (Hands-On)

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Today's Agenda

- ParishSOFT IQ User Interface
  - Column Picker, Results Column & Query Conditions
  - Query Tags
  - Working with Query Results
- Designing & Trouble Shooting Queries
- Hands-on Exercises

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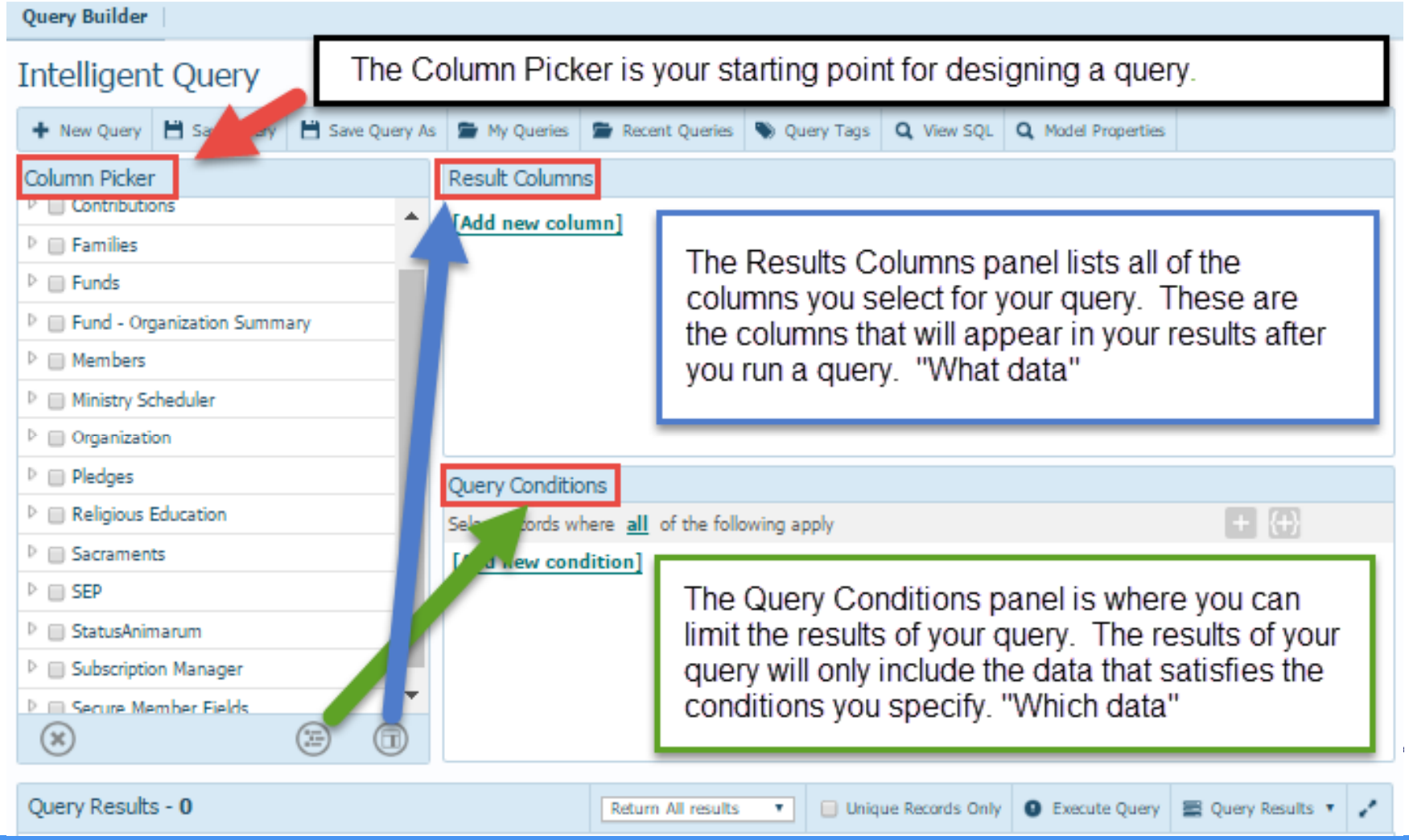
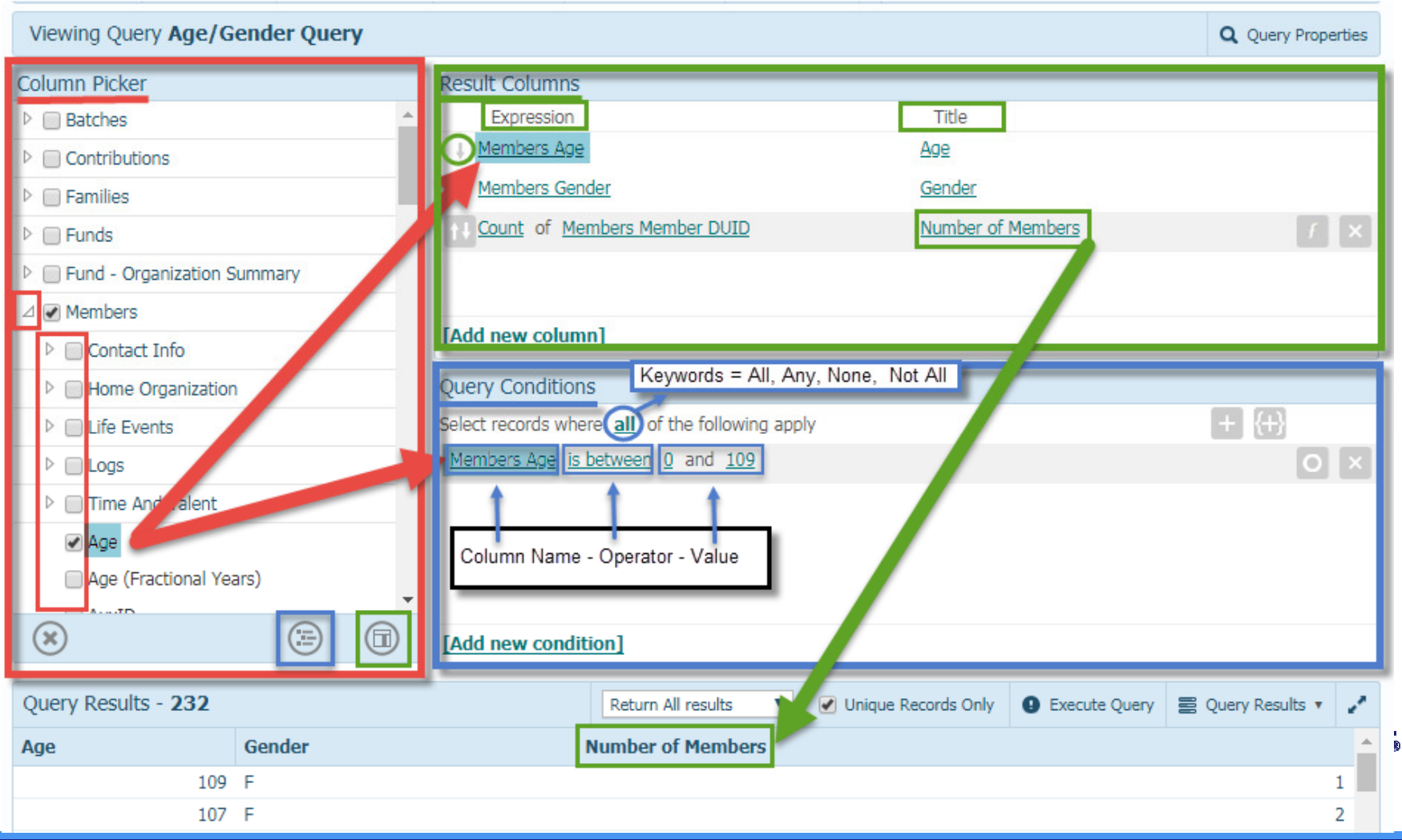
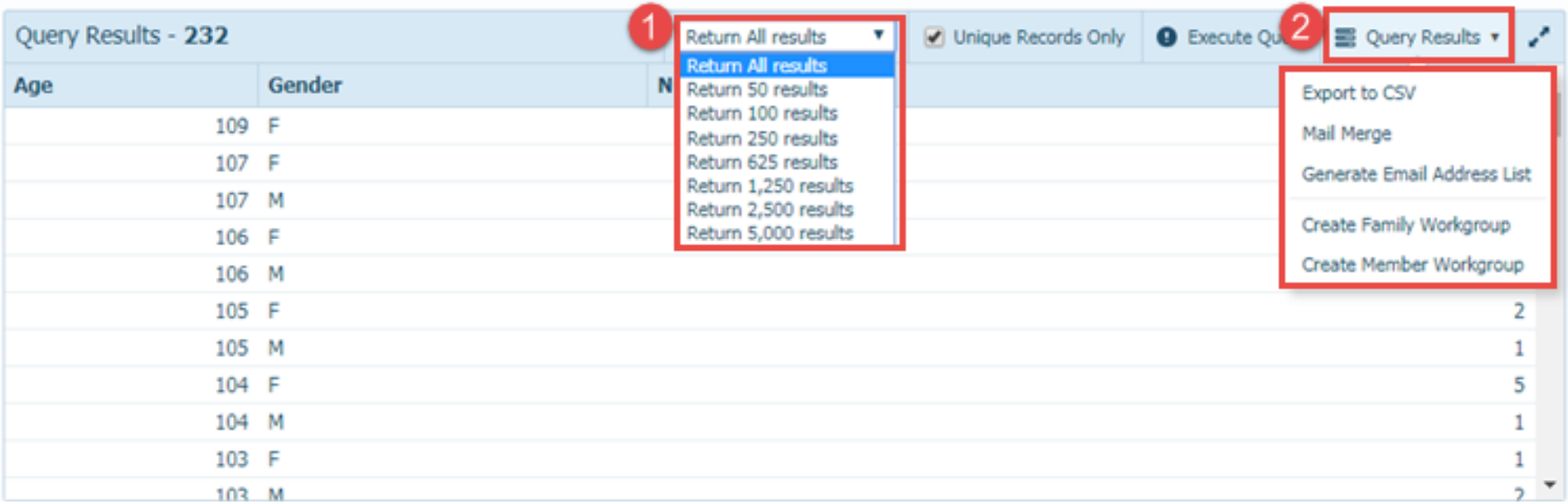

Query Builder
Intelligent Query
The Column Picker is your starting point for designing a query.
New Query
Save Query As
My Queries
Recent Queries
Query Tags
View SQL
Model Properties
Column Picker
Contributions
Families
Funds
Fund - Organization Summary
Members
Ministry Scheduler
Organization
Pledges
Religious Education
Sacraments
SEP
StatusAnimarum
Subscription Manager
Secure Member Fields
Result Columns
[Add new column]
The Results Columns panel lists all of the columns you select for your query. These are the columns that will appear in your results after you run a query. "What data"
Query Conditions
all of the following apply
The Query Conditions panel is where you can limit the results of your query. The results of your query will only include the data that satisfies the conditions you specify. "Which data"
Query Results - 0
Return All results
Unique Records Only
Execute Query
Query Results


Viewing Query Age/Gender Query
Query Properties
Column Picker
Batches
Contributions
Families
Funds
Fund - Organization Summary
Members
Contact Info
Home Organization
Life Events
Logs
Age
Age (Fractional Years)
Result Columns
Expression
Title
Members Age
Age
Members Gender
Gender
Count of Members Member DUID
Number of Members
[Add new column]
Query Conditions
Keywords = All, Any, None, Not All
Select records where all of the following apply
Members Age is between 0 and 109
Column Name - Operator - Value
[Add new condition]
Query Results - 232
Return All results
Unique Records Only
Execute Query
Query Results
Age
Gender
Number of Members
109 F 1
107 F 2

ParishSOFT IQ User Interface: Query Results



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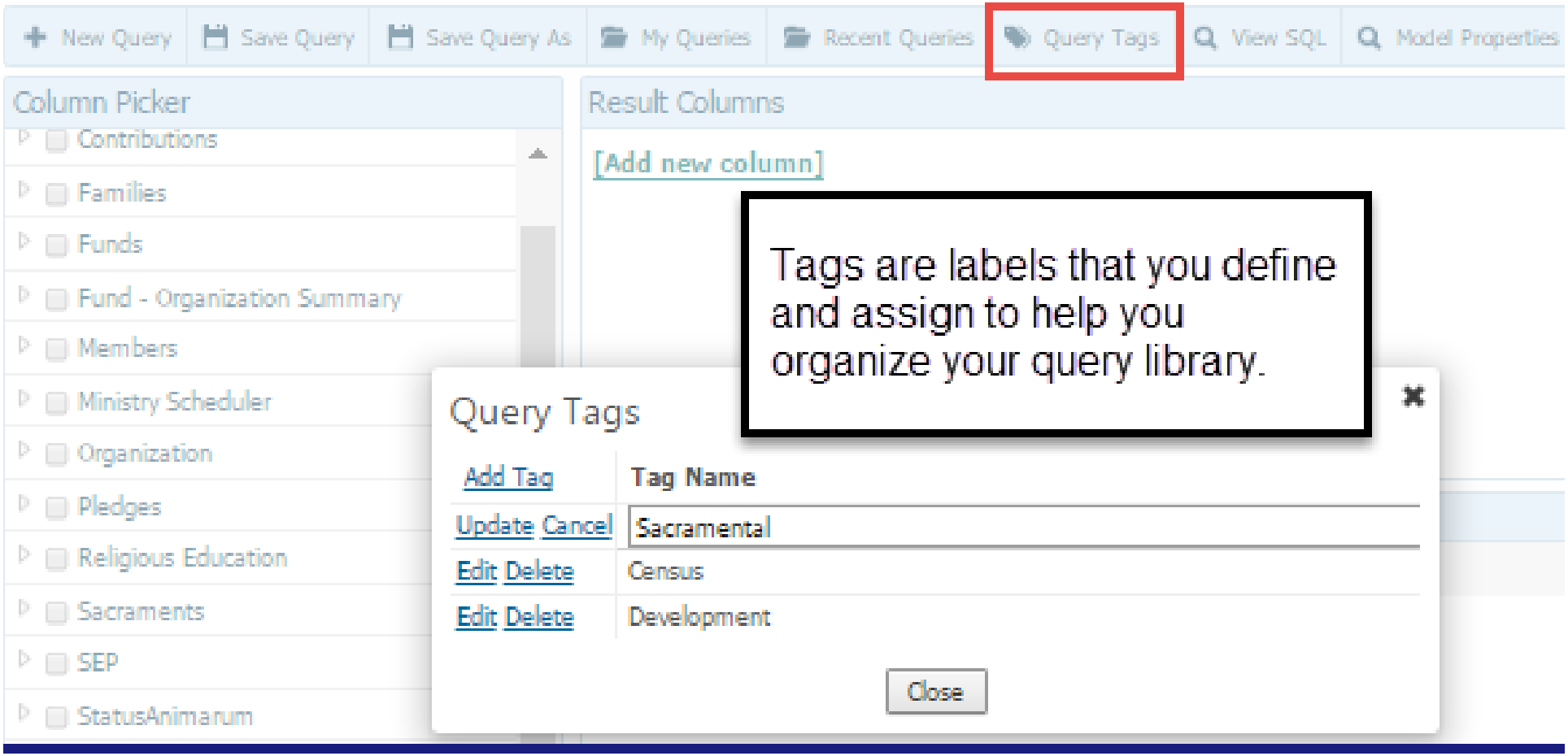
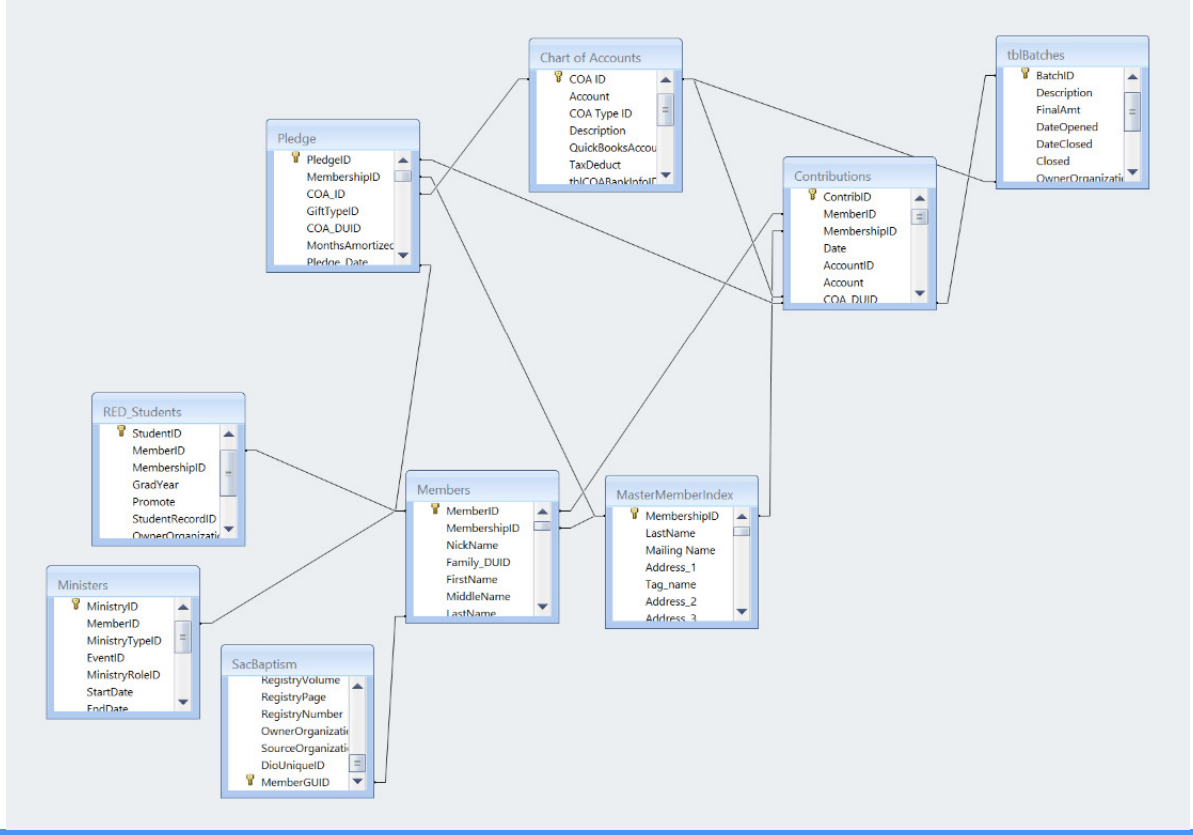
ParishSOFT IQ User Interface: Query Tags



Designing Your Query: Behind the scenes



Designing Your Query: DUIDs

- The DUID (Diocesan/Data Unique ID) is your friend.
- Every type of record has a DUID.
  - Family DUID, Member DUID are commonly used.
  - Contribution DUID, Fund DUID, Minister DUID, etc.
- DUID is used to identify records in each table.
  - DUID keeps records unique.
  - DUID is also used to link tables together.

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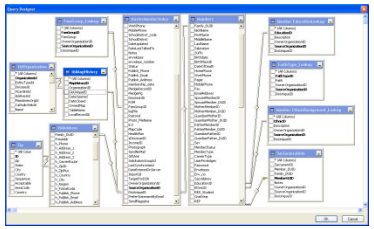
Designing Your Query

What Are You Looking For?



- People who give (Contributions)
- Students/Teachers (Religious Education)
- Registered Families (Families)
- Baptized People (Sacraments)
- Families with Children (Members)
- People who Serve, or Don’t Serve (Ministry Scheduler)

Suggestions for Designing

1. Plan your query
2. Add a column to a Query to find the correct values in a column
3. Add query elements one at a time
4. Check the integrity of the results if the query contains multiple conditions
5. Save Often and ALWAYS
6. Re-Use and Modify

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Trouble Shooting Queries

Not getting the expected results?

1. Did you get the right number records?
2. Are there duplicates in your results?
3. Did you select the right columns?
   - Are you missing columns?
4. Did you select the right keyword?
   - All , Any, None, Not All
5. Did you apply all the desired conditions?
   - Are they specified and spelled correctly?

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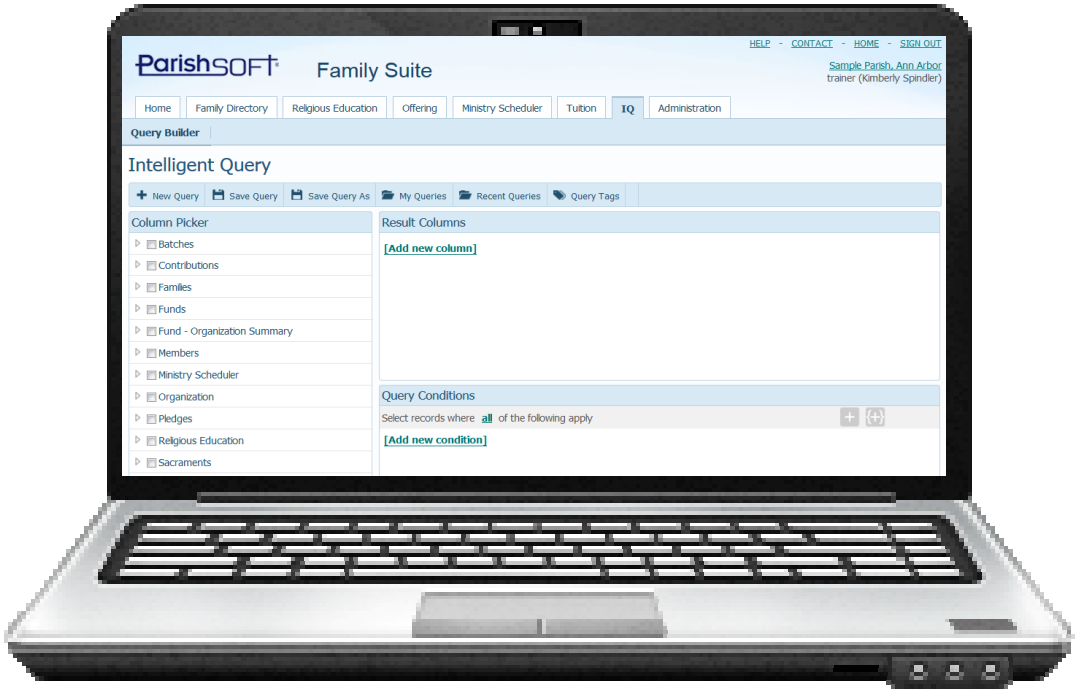
Hands-On Exercises



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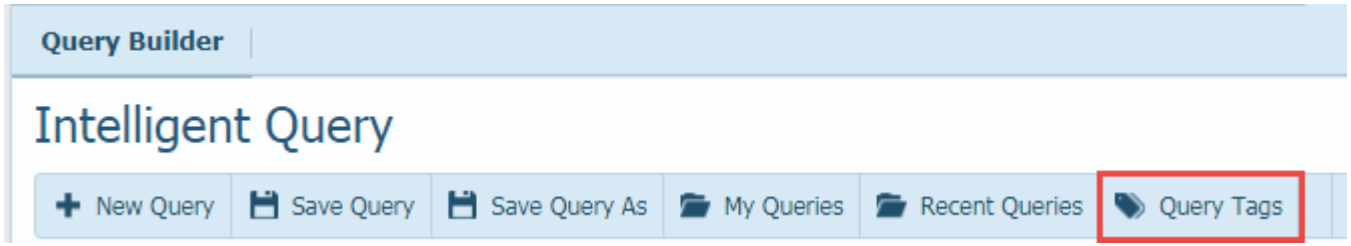
Exercise 1: Query Tags



- Create a “Families” tag
- Create a “Members” tag
- Create a “Contributions” tag
- Create a tag with your name

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Exercise 2: Sorting and Functions

- Sorting
  - Not Sort, Ascending, Descending
  - Move to First, Previous, Next, Last
- Functions *(Aggregate Column)*
  - Sum, Count, Average, Minimum, Maximum

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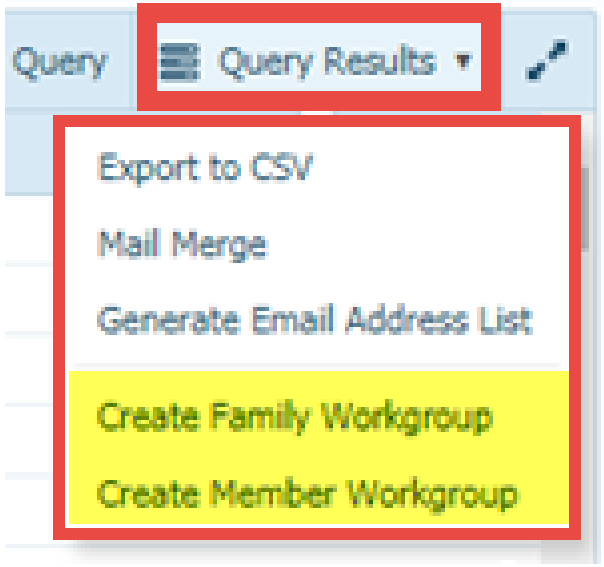
Exercise 3: Creating a Workgroup from IQ



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Exercise 4: Grouping Conditions

- The **And** Operator
- The **Or** Operator
- Using **And** and **Or**
  - Setting up grouped conditions

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Exercise 5: Sub Queries

- What is a Sub Query?
- How ParishSOFT IQ Processes Sub queries
- When to use a Sub Query
  - When you want to know if certain records exist
  - When you don't have enough information
  - When you want to exclude a set of records
- Constructing a Sub Query

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Exercise 6: Query from Other ParishSOFT Modules

- Religious Education
  - Grouping Conditions
- Ministry Scheduler
  - Sub Queries

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Exercise 7: Aggregate Functions

- Sum – Adds all of the values in a column together and returns the sum of the numeric values.
- Count – Counts the number of values in a column that meet the specified condition and returns a single integer value that represents the total number counted.
- Average – Averages the values in a column and returns the average value.
- Minimum – Finds the lowest (smallest) value in a column.
- Maximum – Returns the highest value in a column.

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QUESTIONS?

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Thank you!

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